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MASTER OF MILITARY STUDIES

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**PERFORMANCE EVALUATION SYSTEM UPDATE: CHOOSING THE RIGHT  
FORCE FOR AN AUSTERE FUTURE**

SUBMITTED IN PARTIAL FULFILLMENT  
OF THE REQUIREMENTS FOR THE DEGREE OF  
MASTER OF MILITARY STUDIES

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## **Executive Summary**

**Title:** Performance Evaluation System Update: Choosing the Right Force for an Austere Future

**Author:** Major Paul D. Pfeifer, United States Marine Corps

**Thesis:** While the Performance Evaluation System has been an adequate tool to help select Marines for promotion, the current system is dated. Given the situation created by the recent fiscal austerity and subsequent force drawdown, a more accurate and detailed system needs to be implemented to ensure that the Marine Corps promotes and retains its best and brightest.

**Discussion:** The Marine Corps' Performance Evaluation System uses a top-down evaluation to track the performance of its Marines. Civilian corporations have long since recognized the limitations of top-down evaluation and have adopted 360-degree reviews to gain a more holistic view of their employees. Even though the Marine Corps' culture is very different from a civilian corporation, 360-degree reviews can be effectively incorporated into a hierarchical organization. Besides adding 360-degree reviews, other changes need to be made to the process because the Marine Corps fitness report provides a very myopic assessment of Marines. By adding a few new sections to the fitness report, Marine Corps leaders will be provided with a more accurate picture of a Marines performance and capabilities. Personal accomplishments, education, and MOS credibility are areas that deserve more attention.

**Conclusion:** Without an update to the Performance Evaluation System, Marine Corps leadership is making promotion and retention decisions using incomplete information. By incorporating the changes recommended in this paper, Marine Corp leaders will have more a more thorough record of Marines' performance and consequently will be able to make better-informed decisions regarding promotion and retention.

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## **Introduction**

A critical function for any organization is to ensure that the right people are doing the right job. For that reason, many organizations spend a great deal of money recruiting, hiring, and retaining their star performers. Furthermore, civilian organizations have the luxury of hiring trained individuals from outside the organization to address personnel shortfalls. However, the Marine Corps must “grow” their star performers from within. Therefore, the Marines must identify their future leaders early and track their progression by conducting performance evaluations. Unfortunately, the current Marine Corps Performance Evaluation System is outdated. A more accurate and detailed system needs to be implemented to ensure that the Marine Corps promotes and retains its best and brightest.

## **Background**

Since September 11, 2001, the United States has been at war. To make matters worse, the last five years have been the most economically challenging since the Great Depression. With the national debt rising, the “chickens are coming home to roost” and the “budgetary sequester” has taken effect. Fiscal austerity will be the new reality that government leaders will have to deal with for the foreseeable future.

Until recently, the Department of Defense’s (DoD) budget has been insulated from the recession. Fighting a two-front war has required an inordinate amount of money to acquire new equipment and retain the service members who have gained invaluable combat experience. Bonuses have helped the DoD keep these valuable service members despite exhausting deployment schedules.

In 2007, the Marine Corps decided to grow from 192,000 active duty Marines to 202,000 due to increased operational demands of the wars.<sup>1</sup> Then last year, the Marine Corps announced that they will reduce the force to 182,000 Marines, a 10 percent decrease.<sup>2</sup> Now that the wars are winding down, the DoD has become a prime target for budget-conscious politicians looking to cut expenditures. Although the Marine Corps is the most economical of the four services, it is not exempt from the cuts. The Commandant of the Marine Corps, General James Amos, stated recently that, “We are already a lean and frugal service, thus every reduction that we make from this point forward will cut into bone – we are beyond muscle.”<sup>3</sup> According to Dr. Thomas X. Hammes of the Institute for National Strategic Studies and National Defense University, the political climate and budgetary cuts could force the Marine Corps to shrink to an even lower number of 150,000.<sup>4</sup>

Unlike a civilian corporation that can furlough excess employees, the Marine Corps has to deal with contracts and “regulars” who will be employed as long as they continue to be promoted. “Breaking the faith” by kicking Marines out is not something Marine Corps leadership is comfortable doing. Instead the Marine Corps will have to use fair and unbiased methods to “trim” the force. One way is making promotion and augmentation more competitive. Another less traditional method of “trimming” the force is offering early retirement packages to Marines who have earned the right to stay in the Corps for twenty years but who are no longer competitive for promotion.<sup>5</sup> There is a small portion of Marines who fit this profile, but they could potentially save the Marine Corps millions of dollars (because twenty years of service provides a life-long pension plan with medical benefits). Unfortunately, this is only a “drop in the bucket” compared

to the two-billion dollars per year for the next nine years that the Marine Corps must cut.<sup>6</sup> Consequently, more drastic actions will need to be taken. One such measure being considered is that Marine's retirement benefits will be significantly reduced.<sup>7</sup>

Considering the mandates to reduce the force as well as factoring in reducing retention incentives (i.e. – minimizing retirement benefits), the “perfect storm” of manpower issues is building on the horizon. So how will the Marine Corps overcome these challenging times? One thing is certain: identifying who the best Marines are is of the utmost importance. Currently the Marine Corps relies on fitness reports (a performance evaluation tool) to track the individual performance of Marines. These reports are compiled throughout a Marine's career and the information is used to determine things like promotion, selection to resident professional military education, and command. The current system has done a fine job but many deficiencies have come to light over the years and now it is the time to take a look at improving the system. Glenn Shepard, author of *How to Make Performance Evaluations Really Work* wrote, “They should be constantly changed and updated ... even the best performance evaluations get stale.”<sup>8</sup>

### **Part 1: Performance Evaluation System Overview**

A thorough understanding of the Marine Corps' evaluation system's inner workings is necessary to establish a baseline for future comparison. Therefore, this section will explain what the Performance Evaluation System is, how a fitness report is generated, and how the Headquarters Marine Corps uses the information in the report.

Over the years, the Marine Corps' system has evolved into the current Performance Evaluation System (PES). At its foundation, PES attempts to create a performance-based meritocracy within the Marine Corps by evaluating Marines' performance against defined standards to determine their retention, promotion, and job selection.

Choosing the right type of evaluation tool and the standards by which the subject is measured is vital to the success of the evaluation system. Mark Faram wrote in his article "360 Author Sees Idea Return Home," "Each (performance evaluation) program must be tailored to the organization and its needs."<sup>9</sup> As a military organization, the Marine Corps is fundamentally hierarchical. Thus it has created a "top down" performance evaluation tool called a fitness report (FitRep). An example of the current FitRep can be found in Appendix 2: Current Fitness Report. "Top down" reviews are one-dimensional performance evaluations conducted by a Marine's superior. The Marine Corps has chosen to evaluate a Marine's performance, both on and off duty, by assessing fourteen attributes that are divided into five major categories: Mission Accomplishment, Individual Character, Leadership, Intellect and Wisdom, and Fulfillment of Evaluation Responsibilities.

FitReps are written annually for every Marine from the rank of sergeant to major general. Only one exception is made for Lieutenants, who receive semi-annual reports. The process begins with the Marine Reported On (MRO) using the computer-based Automated Performance Evaluation System (APES) to prepare a Marine Reported On Worksheet (MROW). Once the MRO completes the MROW, it is automatically forwarded to the MRO's boss, the Reporting Senior (RS). Upon receiving the MROW

the RS completes their portion and sends the MROW on to the Reviewing Officer (RO). Finally the RO (the RS's boss) adds their comments to the MROW before then submitting the completed FitRep to Headquarters Marine Corps (HQMC).

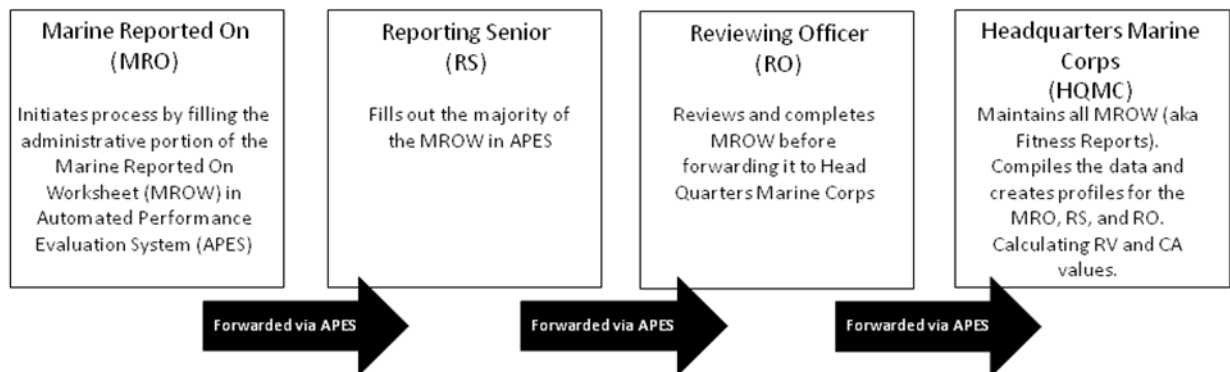
Every FitRep is maintained at HQMC's Personnel Management Support Branch (MMSB). MMSB creates and tracks all of the profiles for MROs, RSs, and ROs. The profiles are generated by calculating relative values (RV) and cumulative assessment values (CA) for every report. "The relative value of each report is based on how the report compares to the RS's rating history for a given grade."<sup>10</sup> Similarly, CA is a relative assessment given by the RO comparing the MRO to other Marines of equal rank. To further clarify, the raw value of a FitRep is only important as to how it compares to the past FitReps written by the RS for other MROs of the same rank. For example, a Marine that receives mediocre marks from their RS may not have an average RV, because the RS may have a history of writing FitReps with low marks. Consequently, the mediocre marks will be better than the RS's average and the RV of the FitRep will be above average. The opposite is true if the RS typically writes FitReps with high marks and the MRO received mediocre marks. CA works in the same way.

Identifying who is above, at, or below average is very important because the Marine Corps is an "up or out" organization. "Up or out" means that if a Marine fails to promote after two attempts they must leave the service. Promotion boards can use "up or out" to help reduce the force by simply promoting fewer Marines. Consequently, job security is not guaranteed; therefore, promoting Marines on merit is paramount to maintaining a fair and equitable system.

In order to remind RS's and RO's of their responsibility of writing accurate FitReps, the Commandant's Guidance is written at the top of every FitRep. It says:

The completed fitness report is the most important information component in manpower management. It is the primary means of evaluating a Marine's performance and is the Commandant's primary tool for the selection of personnel for promotion, augmentation "career designation," resident schooling, command and duty assignments.<sup>11</sup>

The last step of the PES process is how the Marine Corps selects people for promotion, career designation, and resident schooling. MMSB convenes boards to vet the eligible candidates. The boards are composed of senior Marines who use their personal experience along with the candidate's FitReps to choose the right Marines. The actual procedures of the board are beyond the scope of this paper; however, the fact that FitReps are the primary tool to analyze Marines' past performance and speculate on their future potential is very relevant to this paper.



Current PES Flow Chart

## **Part 2: Modernize the Performance Evaluation System Process**

Now that we have established a foundational understanding of the current PES, we can discuss some ways to improve the process. The following sections will focus on incorporating a 360-degree review process, changing the debriefing policy, and improving the automation of PES.

### **360-Degree Reviews**

This section will explain what a 360-degree review is, why some Marines are opposed to 360-degree reviews, and how to create appropriate 360-degree reviews for the Marine Corps.

Three-sixty-degree or multi-rater feedback reviews are an evolutionary step ahead of top-down reviews. Instead of relying on a superior's impression of an subordinate's performance (top-down reviews), 360-degree reviews poll a person's superiors, peers, customers, and employees to develop a more comprehensive assessment of their strengths and weakness. Glenn Shepard wrote, "You will need to gather as much information as possible before you can make an accurate assessment of the employee's performance. A smart manager uses all sources available."<sup>12</sup> Since the 1950's, 360-degree reviews have been gaining momentum as a viable assessment tool. It is estimated that 90 percent of all Fortune 500 companies use some type of multi-rater feedback to improve employee performance.<sup>13</sup>

As discussed earlier in Part 1: Performance Evaluation System Overview, the Marine Corps uses a top-down performance evaluation instead of a 360-degree system. Even though Marines and civilians have exhortated the benefits to using 360-degree reviews, they have never gained "traction" in modifying the PES. Why is this the case?

Surprisingly, the Marine Corps does use a type of 360-degree review, called a Peer Evaluation, at Officer Candidates School and The Basic School to help instructors gauge the performance of its students. One of the problems with Peer Evaluations is the inability of a second lieutenant to judge the fitness of a peer to be an effective officer in the fleet. Furthermore, the students are asked to rank each other. This process is so unpopular that the reviews are nicknamed "Spear" Evaluations. All in all, the misapplication of Peer Evaluation early in officer training has created deep-seeded hatred towards 360-degree reviews.

Another reason some Marines are opposed to implementing 360-Degree evaluations is that subordinates evaluate their superiors' leadership skills and performance. This is a foreign concept to the Marine Corps' hierarchical culture born from the importance of obedience in combat.

Even though there are cultural aversions to 360-degree reviews in the Marine Corps, there are too many benefits to ignore. Dr. Hammes wrote in his article "Time for a 360," "If we are honest, we know it is easier to fool your boss than peers and subordinates."<sup>14</sup> The effects of the personal biases of RSs and ROs toward the MRO will be lessened because 360-degree reviews provide insight that a top-down review cannot.<sup>15</sup> Currently, the RS and RO are the only two people that rate the MRO. According to PES, the RS and RO are allowed to talk with anyone they want to about the MRO's performance, but there is no requirement to do so. By making 360-degree reviews mandatory the RS and RO will take other Marines' assessments into consideration.

As a result, 360-degree reviews will aid the RS and RO identify the MRO's leadership style. From that information, the RS can help the MRO develop into a better

leader. For example, a Marine may be well respected by his peers and seniors but is not well respected by his subordinates because of his dictatorial leadership style. Since creativity and innovation of subordinates can be hindered when leaders exclude their subordinates from the decision making process, a change in leadership style may solve the problem.<sup>16</sup> Therefore, the Marine Corps should to encourage different leadership styles and 360-degree reviews will foster a more open forum between the RS and MRO to discuss “best practices.”

Developing 360-degree reviews that are sensitive to the Marine Corps' culture is the only way to successfully implement the concept into PES. The fear of "Spear" Evaluations or subordinates undermining leaders must be dispelled. The way to do this is through properly educating Marines on the administration and expectations of the 360-degree reviews. These reviews are intended for the RS and RO use only. Headquarters Marine Corps will not collect the data to create an official file containing the reviews.

Rater anonymity is also critical. Their identity must be protected in order to facilitate honest feedback. Even though the surveys may provide contradictory information to the RS's and RO's opinion of the MRO, the intent of the surveys will be met because the RO and RS have more information to leverage.

Another key to incorporating 360-degree reviews into PES is to make the reports legitimate by focusing the review on discovering a Marine's strengths rather than weaknesses. Undoubtedly, weaknesses will be uncovered, but that is not the primary reason for the evaluation.<sup>17</sup> See Appendix 4: 360-Degree Reviews for examples of the proposed reviews. Ranking Marines will no longer be a priority because it is not a good way to motivate people to improve.<sup>18</sup> Doing so will likely hurt unit cohesion and

encourages competition amongst peers instead of individuals seeking self-improvement. After all, these reviews are about improving performance as well as evaluating it.

Implementing 360-degree reviews into APES will be easier than overcoming the cultural biases. The new process will begin when the MRO creates their MROW. An email will be automatically sent to the MRO's peers directing them to conduct the 360-degree review. Simultaneously, emails will be sent to Marines who hold one billet subordinate to the MROW. If the MROW does not have any peers or subordinates in their unit then the reviews are not required. Once the surveys are completed the results will be automatically forwarded to the RS and RO.

Incorporating 360-Degree reviews into the Marine Corps will take some effort, but the increased quality of FitReps will justify the means. The Marine Corps needs to recognize that the current PES top-down review is one-dimensional and they will not get a complete assessment of their officers and non-commissioned officers until the PES is changed.

<u>Step 1</u>	<u>Step 2</u>	<u>Step 3</u>	<u>Step 4</u>
<ul style="list-style-type: none"> <li>•MRO creates MROW</li> <li>•MRO sends MROW to RS via APES</li> <li>•360-degree reviews are automatically sent to peers and subordinates</li> </ul>	<ul style="list-style-type: none"> <li>•RS receives MROW and completed 360-degree reviews from MRO's peers and subordinates</li> <li>•RS writes FitRep</li> <li>•RS forwards FitRep to RO via APES</li> </ul>	<ul style="list-style-type: none"> <li>•RO receives FitRep from RS</li> <li>•RO proof reads FitRep and completes it.</li> <li>•RO returns FitRep to RS via APES</li> </ul>	<ul style="list-style-type: none"> <li>•RS receives FitRep from RO</li> <li>•RS debriefs MRO on completed FitRep</li> <li>•RS submits signed FitRep to MMSB via APES</li> </ul>
MRO- Marine Reported On MROW- Marine Reported on Worksheet (blank evaluation) RS- Reporting Senior APES- Automated Performance Evaluation System		FitRep- Marine Corps Performance Evaluation RO- Reviewing Officer MMSB- Marine Corps Manpower Support Branch	

PES Flow Chart incorporating 360-degree Reviews

## **Debriefing Fitness Reports**

FitRep debriefing is a topic that the Marine Corps needs to readdress. According to PES FitRep debriefs are not mandatory. Other organizations, like the US Navy, do a much better job than the Marine Corps. For example, Navy fighter squadrons publish FitRep debriefs on their flight schedules to ensure that they are conducted.<sup>19</sup> In this section of the paper the Marine Corps PES policy on FitRep debriefs will be explained as well as why it should be changed.

The PES manual says a FitRep is, "Not a communication to, or a counseling document for the Marine."<sup>20</sup> Later in the manual FitReps are described as:

Documentation of observations and assessments of individual performance, personal qualities, character, and potential to serve at a more senior level. The fitness report is not: A) Disciplinary tool. B) A lever to exert influence. C) A counseling document for the MRO.<sup>21</sup>

From these excerpts, the reader can see that the PES manual intends FitReps to be used for administrative purposes only and not to be used for counseling. Unfortunately, when it comes to FitReps the intent of the PES manual and reality are rarely aligned. Any Marine can view their FitReps online and can see the RV and CA of the report. They know how important FitReps are to their careers and they take their evaluation to heart. For that reason, RSs debrief their Marines because people need feedback.

At present, signing a FitRep in the Marine Corps has a negative connotation. It means that the MRO has received an adverse report. Signing a document that has so much influence on a Marine's career is logical. According to Glen Shepard, signing a performance evaluation helps the employee and manager transition the conversation from

a debrief to a "meeting of the minds" about how to improve performance for the next evaluation.<sup>22</sup>

For all of these reasons PES should be changed. First, the new PES will require RSs to debrief every FitRep. During the debrief they will discuss the RV and CA that will be provided on the FitRep in the new *Sections I. Directed and Additional Comments* and *Section J. Review Officer Comments*. Second, the MRO will sign the FitRep to show that they have received a debrief on "the Commandant's primary tool for the selection of personnel for promotion, retention, augmentation, resident schooling, command, and duty assignments" before it is forwarded to HQMC.<sup>23</sup> Ultimately, these debriefs will help improve transparency in PES and will help formalize the end of one reporting period and the beginning of a new one.

### **Automation and Implementation**

Automation is the key to successfully transitioning from the current PES to the new system. Increasing interoperability between administrative databases will facilitate the process by decreasing the amount of data entry the MRO, RS, and RO will do. Decreasing the workload as much as possible is important because incorporating the 360-degree reviews and mandatory debriefs into PES will add a couple of days to the process. No longer will an RS be able to "knock out" all of their FitReps in one evening.

The proposed changes will take a methodical effort by HQMC to implement. Fortunately, the concept is quite simple. First of all, the changes need to be incorporated into the PES by revising the current manual. Next, APES will need some minor adjustments to facilitate interoperability between administrative databases from which much of the MRO's information will be "pulled." Then, the 360-Degree surveys will

need to be created. Finally, HQMC must educate Marines about the new changes before the new system goes online.

Once the Commandant decides that the Marine Corps is ready for the new system, one of two scenarios will happen for MROs. Scenario 1: A Marine will stay on the old system until they get a new RS. Scenario 2: Marines with new RSs will start their reviewing relationship on the new system. Both scenarios provide continuity with the RO and ensure that MRO's reports are not devalued.

The entire turnover period should take approximately two years to complete. Once the new system is in effect the old reports, RV profiles, and CA profiles will be maintained by HQMC electronically and available for boards to use. Even though the old system's reports provide less data than the new system, the boards will have to make do.

### **Part 3: Update to the Fitness Report Document**

There are many deficiencies with the current FitRep document. Instead of "tackling" all of the issues, part three of this paper will focus on incorporating three new sections: *Personal Accomplishments*, *Education*, and *Military Occupation Specialty Credibility*. Additionally, the attributes and grading scale used on the current FitRep will be discussed and this paper will propose a more balanced system. The goal of the proposed improvements is to provide a more complete "picture" of the MRO to RSs, ROs, and boards.

## **Personal Accomplishments**

In the Commandant's White Letters 1-12, 2-12, and 3-12, he addressed a concern with Marines' conduct on and off the battlefield. He expressed the need for the Marine Corps to get "back to the heading of true North."<sup>24</sup> In an attempt to fix the situation, he has conducted several "stand downs" to address ethics with Marine Corps leaders and has directed his staff to construct a campaign plan against sexual assault. Although General Amos' efforts are commendable, he can go a step further. He should incentivize ethical and wholesome behavior by modifying the PES.

An excellent way to do this is by adding a *Personal Accomplishments* section to FitReps so MROs can share their extra-billet accomplishments. The current *Section I. Directed and Additional Comments* provides space for the RS to write about the "whole Marine." Past experiences, the MRO's potential, commendatory remarks, on-duty performance, off-duty conduct, and disciplinary issues are within the scope of the section. Despite the leeway provided to the RS to comment on the MRO, the space provided is inadequate. By incorporating the new section *Personal Accomplishments* the MRO will be able to showcase their own achievements and allow the RS and RO to be more focused with their directed comments.

The new section will provide space for the MRO to write about their off duty accomplishments. Inevitably, RSs and ROs will help MROs vet their remarks and ensure that the comments meet the intent of the new fitness report. Examples of appropriate information for this section are achieving athletic goals, participating in community services, and working with charitable organizations. A character limit for the new section will keep it succinct.

A positive side effect of acknowledging Marines' personal achievements is that they will be encouraged to be more well-rounded and philanthropic citizens. Marines will be inclined to become more involved with off duty activities as long as it helps them get promoted. Ideally, encouraging more positive interactions between Marines and civilians will foster ethical behavior and potentially improve the public opinion of the Marine Corps with Americans.

Another positive side effect of adding the new section will be improving the accuracy of FitReps. This in turn will give RSs, ROs, and boards better qualitative assessments of Marines performance and potential.

### **Education**

The Marines Corps puts a strong emphasis on physical fitness because healthy Marines are more resilient in stressful situations. However, the Marine Corps has not traditionally done as good a job encouraging its Marines to pursue relevant extracurricular education. Like physical fitness strengthens the body, education strengthens the mind. Earning a degree shows commitment and motivation for self-improvement. Marine leaders and scholars are beginning to recognize the merits of education. General Amos recently wrote that, "faced with a period of fiscal austerity and an uncertain world, it is more important now than ever to dedicate time to read and think."<sup>25</sup> Similarly, Lieutenant General (retired) Paul K. Van Riper said while discussing education at the Marine Corps Command and Staff College, "Marines should cast their net widely."<sup>26</sup> He encouraged Marines to study economics, politics, and literature so that they will broaden their understanding of the world and become better critical thinkers.

In keeping with the trend to emphasize education, the Marine Corps has made two changes regarding its policy on resident Professional Military Education (PME). First, the amount of Marines assigned to resident PME has been increased so that a higher percentage of officers can benefit from the education. Second, Marines are now assigned to resident PME instead of applying for it. In the past, Marines were allowed to request resident PME and a board would screen the applicants. Now a board is convened to select the students from every eligible Marine. The difference between the old and new method is subtle but the message is clear: a Marine's performance earns them a slot at resident PME instead of preference.

Surprisingly, there is not a dedicated place on the current FitRep to include educational information. Comments can be made in *Section I. Directed and Additional Comments* but that is at the RS's discretion. This is insufficient. In order to highlight the importance of education, a new section called *Education* should be created. Appendix 4: New Fitness Report shows an example of the new section. In *Education*, the MRO's PME and personal education will be listed to include the institution, the dates attended, and the degree obtained. The new section will be cumulative in nature with updates made each reporting period. That way RSs, ROs, and boards can see what level of education a Marine is working towards or has achieved. Much like including the section Person Accomplishments, the section Education will provide another source of information for qualitative assessment.

### **MOS Credibility**

Every Marine has a specific Military Occupational Specialty (MOS) which they spend the majority of their early years mastering. The current FitRep addresses MOS

progression in *Section B. Billet Description*, *Section C. Billet Accomplishment*, and *Section I. Directed and Additional Commits*. Qualitative assessment information is better than no information at all, but it is heavily dependent on the evaluator's point of view. For instance, a logistician does not understand all the nuances of being a helicopter pilot and vice versus. This is a particularly important point, because boards are composed of Marines from a cross section of different MOSs. Asking them to make decisions about promotion, resident PME, and command on qualitative information alone is not as effective as it would be using quantitative information.

By implementing a new section entitled *MOS Credibility* should help this problem. Please refer to Appendix 4: New Fitness Report for an example of the new section's format. In this section, a Marine's *Deployment History*, *Operation Billets*, and *MOS Specific Information* will be provided. Automation will be the key to link operational deployment information to the software that manages a Marine's Officer Qualification Record or Service Record Book. That way the information will be accurate and legitimate. Also, a percentage will be calculated that compares the number of deployments the MRO has completed to other Marines of the same MOS and time in service.

The operational billet information will be linked to the *Section A. Administrative Information Item 4. Duty Assignment*. The list of billets will be cumulative and will show every job the MRO has done to date. The "key" billets that the MRO has held will be listed on the FitRep and will be given a percentage to indicate how many of the MRO's peers have done the same job.

Also, *MOS Specific Information* will provide data that is important to each individual MOS. The data will be cumulative (like in *Deployment History* and *Operational Billets*) but the RS will be responsible for inputting it instead of the MRO. A research group will be convened to identify what each MOS deems important. Some viable options would be flight leadership qualifications, special schools, and certifications. Each accomplishment will be tracked and measured so that a metric can be assigned in order to measure a Marine's MOS credibility compared to their peers. This information will be used by RSs, ROs, and boards to assess the capabilities and career accomplishments of the MRO.

### **Attributes and Grading Scale**

The current FitRep has several attributes that are redundant. Paring them down will eliminate confusion and help to make the FitRep more concise. Furthermore, the grading scale is unrealistic. The RS has only one option to choose from to classify the MRO's performance as below average. The other six options are various degrees of average to above average performance. The following section will outline the proposed changes to the new FitRep.

The new FitRep condenses the old fourteen attributes into eight. The attribute *Setting the Example* is eliminated as a graded attribute and is placed at the top of the new section entitled *Leading by Example*. General Amos stated in his White Letter 1-12, "The indispensable condition of Marine Corps leadership is action and attitude, not words. We lead by example, and provide continual and close supervision of those we are privileged to lead."<sup>27</sup> This message captures the very essence of the Marine Corps

leadership ethos. *Setting the Example* has been elevated from an attribute to the title of a section of the new FitRep.

The three attributes *Leading Subordinates*, *Developing Subordinates*, and *Ensuring Well-Being of Subordinates* are reduced to two new attributes: *Team Builder* and *Mentorship*. *Professional Military Education* will be removed as an attribute because the new FitRep has added *Section F. Education* to better account for the subject. The ambiguous attribute of *Courage* will be renamed *Moral Courage* because this trait is more commonly tested than physical courage. Finally, *Evaluations* will be removed, because many Marines do not have the opportunity to write FitReps.

Besides having too many attributes, the current report's grading scale needs reevaluating. The difference between the lowest and second lowest scores is excessive. On the current FitRep the lowest score equals an adverse value while the second lowest score meets expectations. Therefore, the scale does not provide a way to indicate that the MRO needs to improve without having career ending implications. Frankly, that is unacceptable and unrealistic.

Consider the description for the second lowest score for the attribute *Communication Skills*. PES defines it as, "Skilled in receiving and conveying information. Communicates effectively in performance of duties."<sup>28</sup> This definition is very positive for the second worst out of seven possibilities. It is unfair to say a young Marine should receive an adverse FitRep for needing more practice briefing a "5-paragraph" order. By creating this situation, PES is forcing RSs to artificially inflate a below average performance because the alternative is too severe.

Fortunately fixing the problems with the current FitReps grading scale is simple. The new FitRep's grading scale will have equal options above *Meets Expectations* as below. That way a Marine can *Need Improvement* without being punished with an adverse report. The goal of these changes is to allow RSs to provide a more realistic assessment of a Marine's performance by more accurately grading below average performance.

### **Conclusion**

The current PES is outdated and has become stale. Marines deserve a better evaluation system. Incorporating 360-degree reviews will provide RSs and ROs with more information to better assess their Marines performance and capabilities. Adding mandatory debriefs will improve transparency with the process and build more trust between RSs and MROs. Increasing automation will help decrease the workload and reduce clerical errors. The FitRep form needs updating too. Information about personal accomplishments, educational achievements, and MOS credibility can and should be tracked on FitReps. Given the significant challenges that the Marine Corps is facing, this is the time to ensure that the best information is provided to Marine leadership so that they can select the best and brightest to lead the Marine Corps into the future.

## Appendix 1: List of Acronyms

- APES- Automated Performance Evaluation System
- CA- Cumulative Assessment Value
- DoD- Department of Defense
- FitRep- Fitness Report
- HQMC- Headquarters Marine Corps
- MMSB- Marine Manpower Support Branch
- MRO- Marine Reported On
- MROW- Marine Reported On Worksheet
- PES- Performance Evaluation System
- RO- Review Officer
- RS- Reporting Senior
- RV- Relative Value

## Appendix 2: Current Fitness Report

<b>USMC FITNESS REPORT (1610)</b> NAVMC 10835A (Rev. 1-01)(P) PREVIOUS EDITIONS WILL NOT BE USED		<b>COMMANDANT'S GUIDANCE</b>		<b>DO NOT STAPLE THIS FORM</b>																																					
<p>The completed fitness report is the most important information component in manpower management. It is the primary means of evaluating a Marine's performance and is the Commandant's primary tool for the selection of personnel for promotion, augmentation, resident schooling, command, and duty assignments. Therefore, the completion of this report is one of an officer's most critical responsibilities. Inherent in this duty is the commitment of each Reporting Senior and Reviewing Officer to ensure the integrity of the system by giving close attention to accurate marking and timely reporting. Every officer serves a role in the scrupulous maintenance of this evaluation system, ultimately important to both the individual and the Marine Corps. Inflationary markings only serve to dilute the actual value of each report. Reviewing Officers will not concur with inflated reports.</p>																																									
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1. Marine Reported On:

a. Last Name

b. First Name

c. MI

d. SSN

2. Occasion and Period Covered:

a. OCC

b. From

To

**D. MISSION ACCOMPLISHMENT**

1. **PERFORMANCE.** Results achieved during the reporting period. How well those duties inherent to a Marine's billet, plus all additional duties, formally and informally assigned, were carried out. Reflects a Marine's aptitude, competence, and commitment to the unit's success above personal reward. Indicators are time and resource management, task prioritization, and tenacity to achieve positive ends consistently.

ADV	Meets requirements of billet and additional duties. Aptitude, commitment, and competence meet expectations. Results maintain status quo.	Consistently produces quality results while measurably improving unit performance. Habitually makes effective use of time and resources; improves billet procedures and products. Positive impact extends beyond billet expectations.	Results far surpass expectations. Recognizes and exploits new resources; creates opportunities. Emulated; sought after as an expert with influence beyond unit. Impact significant; innovative approaches to problems produce significant gains in quality and	N/O
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. **PROFICIENCY.** Demonstrates technical knowledge and practical skill in the execution of the Marine's overall duties. Combines training, education, and experience. Translates skills into actions which contribute to accomplishing tasks and missions. Imparts knowledge to others. Grade dependent.

ADV	Competent. Possesses the requisite range of skills and knowledge commensurate with grade and experience. Understands and articulates basic functions related to mission.	Demonstrates mastery of all required skills. Expertise, education and experience consistently enhance mission accomplishment. Innovative troubleshooter and problem solver. Effectively imparts skills to subordinates.	True expert in field. Knowledge and skills impact far beyond those of peers. Translates broad-based education and experience into forward thinking, innovative actions. Makes immeasurable impact on mission accomplishment. Peerless teacher, selflessly imparts expertise to subordinates, peers, and	N/O
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

JUSTIFICATION:

**E. INDIVIDUAL CHARACTER**

1. **COURAGE.** Moral or physical strength to overcome danger, fear, difficulty or anxiety. Personal acceptance of responsibility and accountability, placing conscience over competing interests regardless of consequences. Conscious, overriding decision to risk bodily harm or death to accomplish the mission or save others. The will to persevere despite uncertainty.

ADV	Demonstrates inner strength and acceptance of responsibility commensurate with scope of duties and experience. Willing to face moral or physical challenges in pursuit of mission accomplishment.	Guided by conscience in all actions. Proven ability to overcome danger, fear, difficulty or anxiety. Exhibits bravery in the face of adversity and uncertainty. Not deterred by morally difficult situations or hazardous responsibilities.	Uncommon bravery and capacity to overcome obstacles and inspire others in the face of moral dilemma or life-threatening danger. Demonstrated under the most adverse conditions. Selfless. Always places conscience over competing interests regardless of physical or personal consequences.	N/O
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. **EFFECTIVENESS UNDER STRESS.** Thinking, functioning and leading effectively under conditions of physical and/or mental pressure. Maintaining composure appropriate for the situation, while displaying steady purpose of action, enabling one to inspire others while continuing to lead under adverse conditions. Physical and emotional strength, resilience and endurance are elements.

ADV	Exhibits discipline and stability under pressure. Judgment and effective problem-solving skills are evident.	Consistently demonstrates maturity, mental agility, and willpower during periods of adversity. Provides order to chaos through the application of intuition, problem-solving skills, and leadership. Composure reassures others.	Demonstrates seldom-matched presence of mind under the most demanding circumstances. Stabilizes any situation through the resolute and timely application of direction, focus and personal presence.	N/O
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. **INITIATIVE.** Action in the absence of specific direction. Seeing what needs to be done and acting without prompting. The instinct to begin a task and follow through energetically on one's own accord. Being creative, proactive and decisive. Transforming opportunity into action.

ADV	Demonstrates willingness to take action in the absence of specific direction. Acts commensurate with grade, training and experience.	Self-motivated and action-oriented. Foresight and energy consistently transform opportunity into action. Develops and pursues creative, innovative solutions. Acts without prompting. Self-starter.	Highly motivated and proactive. Displays exceptional awareness of surroundings and environment. Uncanny ability to anticipate mission requirements and quickly formulate original, far-reaching solutions. Always takes decisive, effective action.	N/O
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

JUSTIFICATION:

1. Marine Reported On:

a. Last Name

b. First Name

c. MI

d. SSN

2. Occasion and Period Covered:

a. OCC

b. From

To

**F. LEADERSHIP**

**1. LEADING SUBORDINATES.** The inseparable relationship between leader and led. The application of leadership principles to provide direction and motivate subordinates. Using authority, persuasion, and personality to influence subordinates to accomplish assigned tasks. Sustaining motivation and morale while maximizing subordinates' performance.

ADV	Engaged; provides instructions and directs execution. Seeks to accomplish mission in ways that sustain motivation and morale. Actions contribute to unit effectiveness.	Achieves a highly effective balance between direction and delegation. Effectively tasks subordinates and clearly delineates standards expected. Enhances performance through constructive supervision. Fosters motivation and enhances morale. Builds and sustains teams that successfully meet mission requirements. Encourages initiative and candor among subordinates.	Promotes creativity and energy among subordinates by striking the ideal balance of direction and delegation. Achieves highest levels of performance from subordinates by encouraging individual initiative. Engenders willing subordination, loyalty, and trust that allow subordinates to overcome their perceived limitations. Personal leadership fosters highest levels of motivation and morale, ensuring mission accomplishment even in the most difficult circumstances.	N/O
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**2. DEVELOPING SUBORDINATES.** Commitment to train, educate, and challenge all Marines regardless of race, religion, ethnic background, or gender. Mentorship. Cultivating professional and personal development of subordinates. Developing team players and esprit de corps. Ability to combine teaching and coaching. Creating an atmosphere tolerant of mistakes in the course of learning.

ADV	Maintains an environment that allows personal and professional development. Ensures subordinates participate in all mandated development programs.	Develops and institutes innovative programs, to include PME, that emphasize personal and professional development of subordinates. Challenges subordinates to exceed their perceived potential thereby enhancing unit morale and effectiveness. Creates an environment where all Marines are confident to learn through trial and error. As a mentor, prepares subordinates for increased responsibilities and duties.	Widely recognized and emulated as a teacher, coach and leader. Any Marine would desire to serve with this Marine because they know they will grow personally and professionally. Subordinate and unit performance far surpassed expected results due to MRO's mentorship and team building talents. Attitude toward subordinate development is infectious, extending beyond the unit.	N/O
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**3. SETTING THE EXAMPLE.** The most visible facet of leadership: how well a Marine serves as a role model for all others. Personal action demonstrates the highest standards of conduct, ethical behavior, fitness, and appearance. Bearing, demeanor, and self-discipline are elements.

ADV	Maintains Marine Corps standards for appearance, weight, and uniform wear. Sustains required level of physical fitness. Adheres to the tenets of the Marine Corps core values.	Personal conduct on and off duty reflects highest Marine Corps standards of integrity, bearing and appearance. Character is exceptional. Actively seeks self-improvement in wide-ranging areas. Dedication to duty and professional example encourage others.	Model Marine, frequently emulated. Exemplary conduct, behavior, and actions are tone-setting. An inspiration to subordinates, peers, and seniors. Remarkable dedication to improving self and others.	N/
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**4. ENSURING WELL-BEING OF SUBORDINATES.** Genuine interest in the well-being of Marines. Efforts enhance subordinates' ability to concentrate/focus on unit mission accomplishment. Concern for family readiness is inherent. The importance placed on welfare of subordinates is based on the belief that Marines take care of their own.

ADV	Deals confidently with issues pertinent to subordinate welfare and recognizes suitable courses of action that support subordinates' well-being. Applies available resources, allowing subordinates to effectively concentrate on the mission.	Instills and/or reinforces a sense of responsibility among junior Marines for themselves and their subordinates. Actively fosters the development of and uses support systems for subordinates which improve their ability to contribute to unit mission accomplishment. Efforts to enhance subordinate welfare improve the unit's ability to accomplish its mission.	Noticeably enhances subordinates' well-being, resulting in a measurable increase in unit effectiveness. Maximizes unit and base resources to provide subordinates with the best support available. Proactive approach serves to energize unit members to "take care of their own," thereby correcting potential problems before they can hinder subordinates' effectiveness. Widely recognized for techniques and policies that produce results and build morale. Builds strong family atmosphere. Puts motto Mission first. Marines always into action.	N/O
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**5. COMMUNICATION SKILLS.** The efficient transmission and receipt of thoughts and ideas that enable and enhance leadership. Equal importance given to listening, speaking, writing, and critical reading skills. Interactive, allowing one to perceive problems and situations, provide concise guidance, and express complex ideas in a form easily understood by everyone. Allows subordinates to ask questions, raise issues and concerns and venture opinions. Contributes to a leader's ability to motivate as well as counsel.

ADV	Skilled in receiving and conveying information. Communicates effectively in performance of duties.	Clearly articulates thoughts and ideas, verbally and in writing. Communication in all forms is accurate, intelligible, concise, and timely. Communicates with clarity and verve, ensuring understanding of intent or purpose. Encourages and considers the contributions of others.	Highly developed facility in verbal communication. Adept in composing written documents of the highest quality. Combines presence and verbal skills which engender confidence and achieve understanding irrespective of the setting, situation, or size of the group addressed. Displays an intuitive sense of when and how to listen.	N/O
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JUSTIFICATION:

1. Marine Reported On:

a. Last Name

b. First Name

c. MI

d. SSN

2. Occasion and Period Covered:

a. OCC

b. From

To

**G. INTELLECT AND WISDOM**

**1. PROFESSIONAL MILITARY EDUCATION (PME).** Commitment to intellectual growth in ways beneficial to the Marine Corps. Increases the breadth and depth of warfighting and leadership aptitude. Resources include resident schools; professional qualifications and certification processes; nonresident and other extension courses; civilian educational institution coursework; a personal reading program that includes (but is not limited to) selections from the Commandant's Reading List; participation in discussion groups and military societies; and involvement in learning through new technologies.

ADV	Maintains currency in required military skills and related developments. Has completed or is enrolled in appropriate level of PME for grade and level of experience. Recognizes and understands new and creative approaches to service issues. Remains abreast of contemporary concepts and issues.	PME outlook extends beyond MOS and required education. Develops and follows a comprehensive personal program which includes broadened professional reading and/or academic course work; advances new concepts and ideas.	Dedicated to life-long learning. As a result of active and continuous efforts, widely recognized as an intellectual leader in professionally related topics. Makes time for study and takes advantage of all resources and programs. Introduces new and creative approaches to services issues. Engages in a broad spectrum of forums and dialogues.	N/O
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A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H ☐

**2. DECISION MAKING ABILITY.** Viable and timely problem solution. Contributing elements are judgment and decisiveness. Decisions reflect the balance between an optimal solution and a satisfactory, workable solution that generates tempo. Decisions are made within the context of the commander's established intent and the goal of mission accomplishment. Anticipation, mental agility, intuition, and success are inherent.

ADV	Makes sound decisions leading to mission accomplishment. Actively collects and evaluates information and weighs alternatives to achieve timely results. Confidently approaches problems; accepts responsibility for outcomes.	Demonstrates mental agility; effectively prioritizes and solves multiple complex problems. Analytical abilities enhanced by experience, education, and intuition. Anticipates problems and implements viable, long-term solutions. Steadfast, willing to make difficult decisions.	Complex problems. Seldom matched analytical a	N/O
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**3. JUDGMENT.** The discretionary aspect of decision making. Draws on core values, knowledge, and personal experience to make wise choices. Comprehends the consequences of contemplated courses of action.

ADV	Majority of judgments are measured, circumspect, relevant, and correct.	Decisions are consistent and uniformly correct, tempered by consideration of their consequences. Able to identify, isolate and assess relevant factors in the decision making process. Opinion sought by others. Subordinates personal interests in favor of impartiality.	Decisions reflect exceptional insight and wisdom beyond this Marine's experience. Counsel sought by all; often an arbiter. Consistent, superior judgment inspires the confidence of seniors.	N/O
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A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H ☐

JUSTIFICATION:

**H. FULFILLMENT OF EVALUATION RESPONSIBILITIES**

**1. EVALUATIONS.** The extent to which this officer serving as a reporting official conducted, or required others to conduct, accurate, unbiased, and timely evaluations.

ADV	Occasionally submitted untimely or administratively incorrect evaluations. As RS, submitted one or more reports that contained inflated markings. As RO, concurred with one or more reports from subordinates that were returned by HQMC for inflated marking.	Prepared unbiased evaluations which were consistently submitted on time. Evaluations accurately described performance and character. Evaluations contained no inflated markings. No reports returned by RO or HQMC for inflated marking. No subordinates' reports returned by HQMC for inflated marking. Few, if any, reports were returned by RO or HQMC for administrative errors. Section Cs were void of superlatives. Justifications were specific, verifiable, substantive, and where possible, quantifiable and supported the markings.	No reports submitted late. No reports returned by either RO or HQMC for administrative correction or inflated markings. No subordinates' reports returned by HQMC for administrative correction or inflated markings. Returned procedurally or administratively incorrect reports to subordinates for correction. As RO nonconcurred with all inflated reports.	N/O
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A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H ☐

JUSTIFICATION:

1. Marine Reported On		2. Occasion and Period Covered	
a. Last Name	b. First Name	c. MI	d. SSN
		a. OCC	b. From To

**I. DIRECTED AND ADDITIONAL COMMENTS**

**J. CERTIFICATION**

1. I CERTIFY that to the best of my knowledge and belief all entries made hereon are true and without prejudice or partiality and that I have provided a signed copy of this report to the Marine Reported on.

\_\_\_\_\_

(Signature of Reporting Senior)

(Date in YYYYMMDD format)

2. I ACKNOWLEDGE the adverse nature of this report and

☐ I have no statement to make

☐ I have attached a statement

\_\_\_\_\_

(Signature of Marine Reported On)

(Date in YYYYMMDD format)

**K. REVIEWING OFFICER COMMENTS**

1. OBSERVATION: <input type="checkbox"/> Sufficient <input type="checkbox"/> Insufficient	2. EVALUATION: <input type="checkbox"/> Concur <input type="checkbox"/> Do Not Concur
---	---

<b>3. COMPARATIVE ASSESSMENT:</b> Provide a comparative assessment of potential by placing an "X" in the appropriate box. In marking the comparison, consider all Marines of this grade whose professional abilities are known to you personally.	<b>DESCRIPTION</b>	<b>COMPARATIVE ASSESSMENT</b>
	THE EMINENTLY QUALIFIED MARINE	<input type="checkbox"/>
	ONE OF THE FEW EXCEPTIONALLY QUALIFIED MARINES	<input type="checkbox"/>
	ONE OF THE MANY HIGHLY QUALIFIED PROFESSIONALS WHO FORM THE MAJORITY OF THIS GRADE	<input type="checkbox"/>
	A QUALIFIED MARINE	<input type="checkbox"/>
	UNSATISFACTORY	<input type="checkbox"/>

4. REVIEWING OFFICER COMMENTS: Amplify your comparative assessment mark; evaluate potential for continued professional development to include: promotion, command, assignment, resident PME, and retention; and put Reporting Senior marks and comments in perspective.

5. I CERTIFY that to the best of my knowledge and belief all entries made hereon are true and without prejudice or partiality.

\_\_\_\_\_

(Signature of Reviewing Officer)

(Date in YYYYMMDD format)

6. I ACKNOWLEDGE the adverse nature of this report and

☐ I have no statement to make

☐ I have attached a statement

\_\_\_\_\_

(Signature of Marine Reported On)

(Date in YYYYMMDD format)

**L. ADDENDUM PAGE**

ADDENDUM PAGE ATTACHED: YES

ADDENDUM PAGE

DO NOT STAPLE  
 THIS FORM

**A. PURPOSE**

1. Marine Reported On			2. Occasion and Period Covered		
a. Last Name	b. First Name	c. MI	d. SSN	e. Grade	a. OCC b. From To
3. Purpose					
a. Continuation of Comments		b. Accelerated Promotion		c. Adverse Report	
Justification	Section I RO	Justification	MRO Statement	3rd Officer Sighter	d. Admin Review
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			e. Supplemental Material		f. HQMC Use
			<input type="checkbox"/>		<input type="checkbox"/>

**B. TEXT**

**C. SUBMITTED BY**

1. a. Last Name	b. First Name	c. MI	2. SSN	3. Service	4. Grade
Signature				<div style="display: flex; justify-content: space-around;"> <div><input type="text"/></div> <div><input type="text"/></div> <div><input type="text"/></div> </div>	
				(Date in YYYYMMDD format)	

**D. GENERAL/SENIOR OFFICER ADVERSE REPORT SIGHTING**

1. a. Last Name	b. First Name	c. MI	2. SSN	3. Service	4. Grade
5. Title					
Signature				<div style="display: flex; justify-content: space-around;"> <div><input type="text"/></div> <div><input type="text"/></div> <div><input type="text"/></div> </div>	
				(Date in YYYYMMDD format)	

PAGE  OF

### Appendix 3: New Fitness Report

USMC FITNESS REPORT (1610)									
NAVMC 10835A (Rev. XXX)									
SAMPLE FORM NOT TO BE USED									
<b>COMMANDANT'S GUIDANCE</b>									
<p>The completed fitness report is the most important information component in manpower management. It is the primary means of evaluation a Marine's performance and is the Commandant's primary tool for the selection of personnel for promotion, augmentation, resident schooling, command, and duty assignments. Therefore, the completion of the report is one of an officer's most critical responsibilities. Inherent in this duty is the commitment of each Reporting Senior and Reviewing Officer to ensure the integrity of the system by giving close attention to accurate marking and timely reporting. Every officer serves a role in the scrupulous maintenance of this evaluation system, ultimately important to both the individual and the Marine Corps. Inflationary markings only serve to dilute the actual value of each report. Reviewing Officers will not concur with inflated reports.</p>									
<b>A. ADMINISTRATIVE INFORMATION</b>									
1. Marine Reported On:									
a. Last Name	b. First Name	c. MI	d. SSN	e. Grade	f. DOR	g. PMOS	h. BILMOS		
2. Organization:									
a. MCC	b. RUC	c. Unit Description							
3. Occasion and Period Covered:									
a. OCC	b. From	c. To	d. Type	4. Duty Assignment (descriptive title):					
5. Special Case:									
a. Adverse	b. Not Observed	c. Extended	6. Marine Subject Of:				7. Promote:		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a. Commendatory Material	b. Derogatory Material	c. Disciplinary Action	a. Yes	b. No	c. N/A	
8. Special Information:									
a. QUAL	b. PFT	c. CFT	d. HT	e. WT	f. Body Fat	g. Reserve Component	h. Status	i. Future Use	
9. Reporting Senior:									
a. Last Name	b. Init	c. Service	d. SSN	e. Grade	f. Duty Assignment				
10. Reporting Officer:									
a. Last Name	b. Init	c. Service	d. SSN	e. Grade	f. Duty Assignment				
<b>B. BILLET DESCRIPTION</b>									
<b>C. BILLET ACCOMPLISHMENTS</b>									

1. Marine Reported On:				2. Occasion and Period Covered:		
a. Last Name	b. First Name	c. MI	d. SSN	a. OCC	b. From	To
<b>D. PERSONAL ACCOMPLISHMENTS</b>						
<b>E. LEADING BY EXAMPLE</b>						
Every Marine who receives a fitness report is a leader. Furthermore, <b>leading by example</b> is a hallmark of The Marine Corps' leadership ethos and every MRO should be evaluated with that in mind.						
1. Knowledge <small>Marine's acquired tactical, technical, and administrative expertise with regard to their respective billet and/or military operational specialty.</small>	ADVERSE <input type="checkbox"/>	NEEDS IMPROVEMENT <input type="checkbox"/>	MEETS EXPECTATIONS <input type="checkbox"/>	EXCEEDS EXPECTATIONS <input type="checkbox"/>	EXEMPLARY <input type="checkbox"/>	N/O <input type="checkbox"/>
Justification for Adverse or Exemplary:						
2. Industrious <small>Marine's ability to get work done quickly and efficiently. In addition, a Marine's desire to seek out additional duties and responsibilities.</small>	ADVERSE <input type="checkbox"/>	NEEDS IMPROVEMENT <input type="checkbox"/>	MEETS EXPECTATIONS <input type="checkbox"/>	EXCEEDS EXPECTATIONS <input type="checkbox"/>	EXEMPLARY <input type="checkbox"/>	N/O <input type="checkbox"/>
Justification for Adverse or Exemplary:						
3. Moral Courage <small>Marine behaves morally and ethically within the standards of the USMC. Also, doing the "right thing" despite the circumstances.</small>	ADVERSE <input type="checkbox"/>	NEEDS IMPROVEMENT <input type="checkbox"/>	MEETS EXPECTATIONS <input type="checkbox"/>	EXCEEDS EXPECTATIONS <input type="checkbox"/>	EXEMPLARY <input type="checkbox"/>	N/O <input type="checkbox"/>
Justification for Adverse or Exemplary:						
4. Effectiveness Under Stress <small>Marine's ability to cope with adversity and accomplish their mission.</small>	ADVERSE <input type="checkbox"/>	NEEDS IMPROVEMENT <input type="checkbox"/>	MEETS EXPECTATIONS <input type="checkbox"/>	EXCEEDS EXPECTATIONS <input type="checkbox"/>	EXEMPLARY <input type="checkbox"/>	N/O <input type="checkbox"/>
Justification for Adverse or Exemplary:						
5. Dedication <small>Marine's goals are aligned with the needs of the organization. Punctuality, adhering to standards, and prioritization of responsibilities are parts of dedication.</small>	ADVERSE <input type="checkbox"/>	NEEDS IMPROVEMENT <input type="checkbox"/>	MEETS EXPECTATIONS <input type="checkbox"/>	EXCEEDS EXPECTATIONS <input type="checkbox"/>	EXEMPLARY <input type="checkbox"/>	N/O <input type="checkbox"/>
Justification for Adverse or Exemplary:						
6. Communication Skills <small>Marine can clearly and effectively receive and present information. Strong listening, speaking, writing, and reading skills are aspects of good communication skills.</small>	ADVERSE <input type="checkbox"/>	NEEDS IMPROVEMENT <input type="checkbox"/>	MEETS EXPECTATIONS <input type="checkbox"/>	EXCEEDS EXPECTATIONS <input type="checkbox"/>	EXEMPLARY <input type="checkbox"/>	N/O <input type="checkbox"/>
Justification for Adverse or Exemplary:						
7. Team Builder <small>Marine fosters a cohesive working environment, incorporates new Marines into the unit, and improves the unit's mission accomplishment.</small>	ADVERSE <input type="checkbox"/>	NEEDS IMPROVEMENT <input type="checkbox"/>	MEETS EXPECTATIONS <input type="checkbox"/>	EXCEEDS EXPECTATIONS <input type="checkbox"/>	EXEMPLARY <input type="checkbox"/>	N/O <input type="checkbox"/>
Justification for Adverse or Exemplary:						



1. Marine Reported On:				2. Occasion and Period Covered:			
a. Last Name	b. First Name	c. MI	d. SSN	a. OCC	b. From	To	

**H. DIRECTED AND ADDITIONAL COMMENTS**

1. Relative Value of this Report:  
 2. Comments:

**I. RS CERTIFICATION**

1. I CERTIFY that to the best of my knowledge and belief all entries made herein are true and without prejudice or partiality and that I have provided a signed copy of this report to the Marine Reported on.

\_\_\_\_\_  
(Signature of Reporting Senior)

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(Date in YYYYMMDD format)

2. I HAVE BEEN DEBRIEFED on the relative value of this FitRep.

☐ I have no statement to make.

☐ I have attached a statement.

\_\_\_\_\_  
(Signature of Marine Reported On)

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(Date in YYYYMMDD format)

**J. REVIEWING OFFICER COMMENTS**

1. OBSERVATION: ☐ Sufficient ☐ Insufficient

2. Evaluation: ☐ Concur ☐ Do not concur

1. COMPARATIVE ASSESSMENT <small>Provide a comparative assessment of potential by placing an "X" in the appropriate box. In making the comparison, consider all Marines of this grade whose professional abilities are known to you personally.</small>	DESCRIPTION	COMPARATIVE ASSESSMENT
	THE EMINENTLY QUALIFIED MARINE	
	ONE OF THE FEW EXCEPTIONALLY QUALIFIED MARINES	
	ONE OF THE MANY HIGHLY QUALIFIED PROFESSIONALS WHO FORM THE MAJORITY OF THIS GRADE	
	A QUALIFIED MARINE	
	UNSATISFACTORY	

3. Cumulative Assessment Value of this Report:  
 4. REVIEWING OFFICER COMMENTS:

**J. RO CERTIFICATION**

1. I CERTIFY that to the best of my knowledge and belief all entries made herein are true and without prejudice or partiality and that I have provided a signed copy of this report to the Marine Reported on.

\_\_\_\_\_  
(Signature of Reviewing Officer)

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(Date in YYYYMMDD format)

2.

☐ I have no statement to make.

☐ I have attached a statement.

\_\_\_\_\_  
(Signature of Marine Reported On)

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(Date in YYYYMMDD format)



## Appendix 4: Sample 360 Reviews

### Sample Peer Questionnaire:

Traits	Needs Improvement	Satisfactory	Above Average	Outstanding	Not Observed
Dependability					
Team Work					
Leadership					
Initiative					
Loyalty					
Integrity					
Enthusiasm					
Communication Skills					
Tactical and/or Proficiency					

Additional Information:
Areas where MRO excels:
Areas to improve:

Sample Subordinate Questionnaire:

Traits	Needs Improvement	Satisfactory	Above Average	Outstanding	Not Observed
Leads by example					
Develops Subordinates					
Cares for Subordinates					
Demonstrates Moral Courage					
Administers Punishment fairly					
Does not show favoritism					
Promotes a positive work environment					
Knowledge of Administrative Procedures					
Conducts timely Performance Reviews					

Additional Information:
Areas where MRO excels:
Areas that need improving:

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<sup>1</sup> Onslow County Tax Administration, "United States Marine Corps 202K Grow the Force Initiative", July 2012, 1, <http://www.kornegaygiddens.com/DataCenter.pdf>.

<sup>2</sup> Dan Lamothe, "20,000 Marines to be cut, Pentagon announces." *Marine Corps Times*, January 2012, <http://www.marinecorpstimes.com/news/2012/01/marine-20000-marines-to-be-cut-012612/>.

<sup>3</sup> Commandant of the Marine Corps. White Letter 1-13: Sequestration, <http://www.marines.mil/Portals/59/White%20Letter%201-13.pdf>.

<sup>4</sup> Dr. T.X. Hammes spoke to the USMC Command and Staff College about the future threats to the United States and Marine Corps. During his presentation he explained that the "sequester" may be the beginning of more budgetary cuts for the DoD. He anticipates that Congress will direct the Marine Corps to decrease the force to as low as 150,000 Marines.

<sup>5</sup> Commandant of the Marine Corps. FY13 Marine Corps Officer Temporary Early Retirement Authority (TERA) Program. Maradmin 543/12, October 1, 2012, <http://www.marines.mil/News/Messages/MessagesDisplay/tabid/13286/Article/121334/fy13-marine-corps-officer-temporary-early-retirement-authority-tera-program.aspx>

<sup>6</sup> Commandant of the Marine Corps. White Letter 1-13: Sequestration, <http://www.marines.mil/Portals/59/White%20Letter%201-13.pdf>.

<sup>7</sup> In 2009, the author saw a Power Point Presentation created by a Pentagon working group to discuss possible ways to save money. One method was to eliminate the Marine Corps Aviation Incentive Bonus. In 2012, the Aviation Incentive Bonus was suspended. Another method to save money was decreasing retirement benefits for service members. It is yet to be seen if the retirement benefits will be affected.

<sup>8</sup> Glen Shepard, *How to make performance evaluations really work: A step by step guide* (John Wiley & Sons, 2005), 45.

<sup>9</sup> Joseph M. Lizarraga, "Institutionalizing the Trifocal Review," *Marine Corps Gazette*, December 2006: 29-29.

<sup>10</sup> Commandant of the Marine Corps. *Performance Evaluation System*, MCO P1610.7F Ch 2, November 2010, 8-9, <http://www.marines.mil/News/Publications/ELECTRONICLIBRARY/ElectronicLibraryDisplay/tabid/13082/Article/126619/mco-p16107f-wch-1-2-final.aspx>.

<sup>11</sup> *Performance Evaluation System*, B-1.

<sup>12</sup> Shepard, 56.

<sup>13</sup> Shane Thorton, "History of 360 Degree Feedback," *EHow Money*, ([http://www.ehow.com/about\\_5163489\\_history-degree-feedback.html](http://www.ehow.com/about_5163489_history-degree-feedback.html))

<sup>14</sup> Thomas X. Hammes, "Time for a 360," *Marine Corps Gazette*, April 2002: 49-50.

<sup>15</sup> Brett T. McGinley, "No Time Like the Present," *Marine Corps Gazette*, August 2006: 27-30

<sup>16</sup> Anne Bruce, *Manager's Guide to Motivating Employees*, 2<sup>nd</sup> ed. (McGraw-Hill, 2011), 20.

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<sup>17</sup> Jack Zenger and Joseph Folkman, "Getting 360 Degree Review Right," *Havard Business Review Blog Network*, September 7, 2012, [http://blogs.hbr.org/cs/2012/09/getting\\_360\\_degree\\_reviews\\_right.html](http://blogs.hbr.org/cs/2012/09/getting_360_degree_reviews_right.html).

<sup>18</sup> Shepard, 69.

<sup>19</sup> While serving in VFA-106 (the largest F/A-18 squadron in the Navy and Marine Corps), the author observed the Navy's culture surrounding its FitReps. One of the biggest differences between the two services is the emphasis put on debriefing FitReps. The Navy requires the Commanding Officer to debrief his Officers on their FitReps. One method they use to ensure that the debriefs are conducted is by "hard" scheduling the debriefs on the flight schedule.

<sup>20</sup> *Performance Evaluation System*, 1-3.

<sup>21</sup> *Performance Evaluation System*, 1-5.

<sup>22</sup> Shepard, 75.

<sup>23</sup> *Performance Evaluation System*, 1-5.

<sup>24</sup> Commandant of the Marine Corps, White Letter 1-12: Leadership and Conduct, [http://www.2874productions.info/files/rCorps\\_NCO\\_Toolbox/CMC\\_White\\_Letter\\_1-12\\_Leadership\\_and\\_Conduct.pdf](http://www.2874productions.info/files/rCorps_NCO_Toolbox/CMC_White_Letter_1-12_Leadership_and_Conduct.pdf)

Commandant of the Marine Corps, White Letter 2-12: Sexual Assault  
<http://www.29palms.marines.mil/Portals/56/Docs/G1/SAPR/White%20Letter%20No%202-12.pdf>

Commandant of the Marine Corps, White Letter 3-12: Leadership  
<http://www.imef.marines.mil/Portals/68/Docs/SARC/CMC%20White%20Letter%20No.%203-12.pdf>

<sup>25</sup> Commandant of the Marine Corps, White Letter 4-12: Reading in the Marine Corps <http://www.mca-marines.org/files/CMC%20White%20Letter%204-12.pdf>

<sup>26</sup> In August 2012, Lieutenant General Paul K. Van Riper spoke to the Marine Corps Command and Staff College. During his presentation, he made a point that war is a "wicked" complex problem and that leaders must have a broad education in order to better analyze the situations they will face.

<sup>27</sup> Commandant of the Marine Corps, White Letter 1-12: Leadership and Conduct, [http://www.2874productions.info/files/rCorps\\_NCO\\_Toolbox/CMC\\_White\\_Letter\\_1-12\\_Leadership\\_and\\_Conduct.pdf](http://www.2874productions.info/files/rCorps_NCO_Toolbox/CMC_White_Letter_1-12_Leadership_and_Conduct.pdf)

<sup>28</sup> *Performance Evaluation System*, 4-34.

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